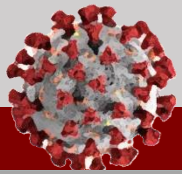
Case Investigators: Entering a Contact

COVID-19 Community Team Outreach



Review the below for an overview of key points for entering contacts for the first time:

Logging In

Navigate to the CCTO Tool and enter your login information.

- **If you have an email ending in dhhs.gov,** log in using your current credentials.
- **If you do not have a county or other email,** the format of your login will be YOURNCIDUSERNAME@ncid.gov.

If you experience issues logging in, try opening the Tool in an incognito window or a new browser (e.g., Chrome, Internet Explorer) where you are not already signed in. **Check with your NCID Administrator if you are unsure or continue to experience issues.**

Adding a New Contact

First, navigate to the Contacts Tab, and THEN click "+ New."

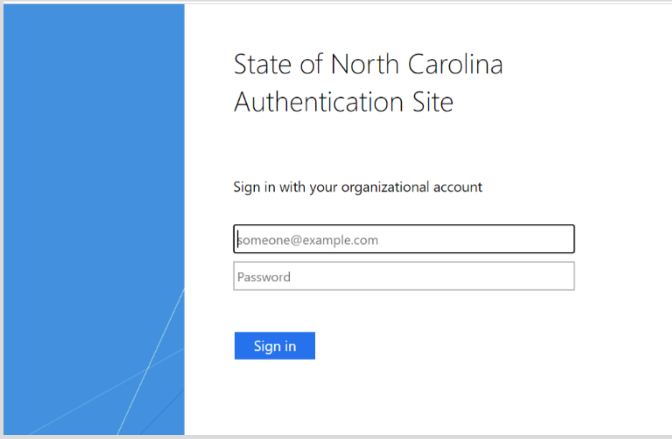
Certain fields are required to help us properly track our data and slow the spread of COVID-19. Ensure you properly input the following information, **including the NC EDSS Event ID of the patient who named this contact:**

1. **First Name**
2. **Last Name**
3. **NC EDSS Event ID**
4. **Last Date of Exposure**

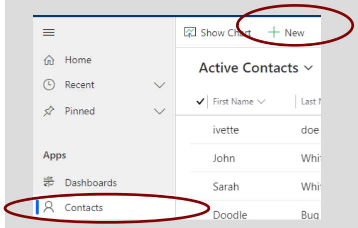
Monitoring Info Needed

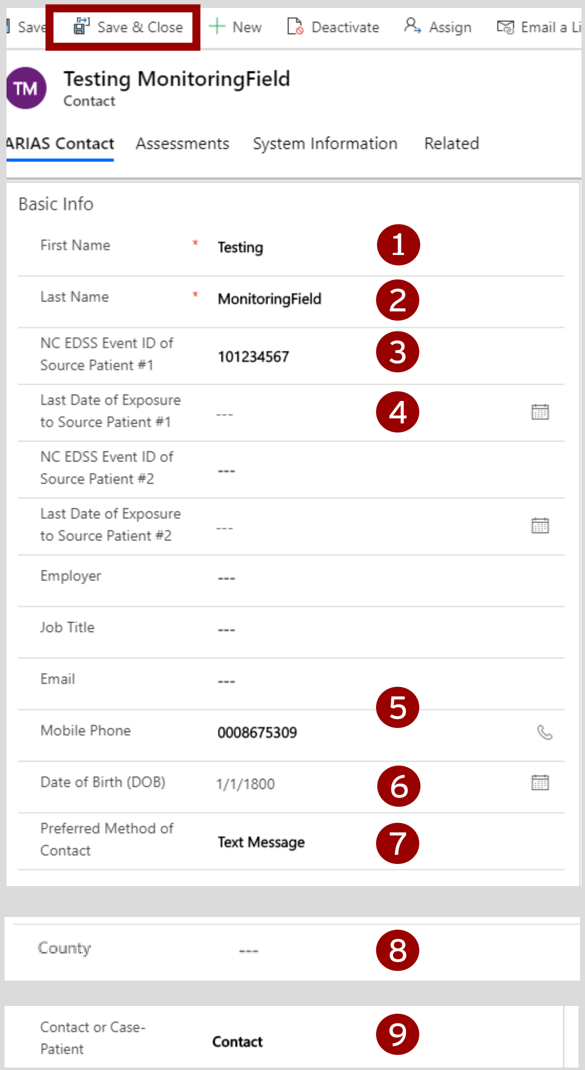
These fields about your contact are required to help initiate and manage monitoring efforts. Input as much information as possible, focusing on these required areas:

5. **Contact Information**
   As much as possible
6. **Date of Birth**
   Required to begin digital monitoring
7. **Pref. Method of Contact**
   Determines how outreach occurs
8. **County *(in "Address")***
   Entering the county will link the contact to their LHD
9. **Contact/Case *(lower left)***
   Indicates if an individual has tested positive for COVID-19



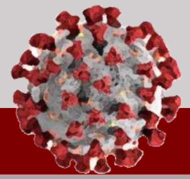
If you experience issues, try logging in from a new internet browser before contacting your IT administrator.





Always click "Save" or "Save and Close" at the top left to record your work.

Always enter the county name *only* with no abbreviations or extra words (e.g., enter *"Durham,"* not *"Durham County"*).



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If you are entering a household, consider the following best practices to support your work:

NOTE: Always enter all the members of a household as separate contacts, including as much information for each individual (i.e. address, demographic information, etc.).

Creating a View for Households

To review all the members of a household and ensure you've properly logged their information, you can create a "View" that will appear in the "Active Contacts" dropdown and populate addresses:

1. Click "Create View" in the top menu.
2. In "Used Saved View," select "My Active Contacts." ***If you want to look at contacts created by others, you can choose "Active Contacts," which will allow you to see individuals currently assigned to others and filter by owner.***
3. Select "Edit Columns."
4. Click "Add Columns."
5. Select "Address Line 1" and "Address Line 2" and press "OK."
6. Scroll to the far right to view your new columns. Highlight each and click the left arrow to move it. Here, we move both after "Last Name."
7. Click "OK."
8. Click "Save As," name your view "Household View," and click "Save."
9. The view is now available in the Contacts tab by clicking "Active Contacts" and choosing your view.
10. If all members of a household have had their information entered properly, filtering or sorting on the "Address 1" and "Address 2" columns will allow you to view them.

1 "Create View"

2 "Use Saved View"

3 "Edit Columns"

4 "Add Columns"

5 Address Line 1, 2

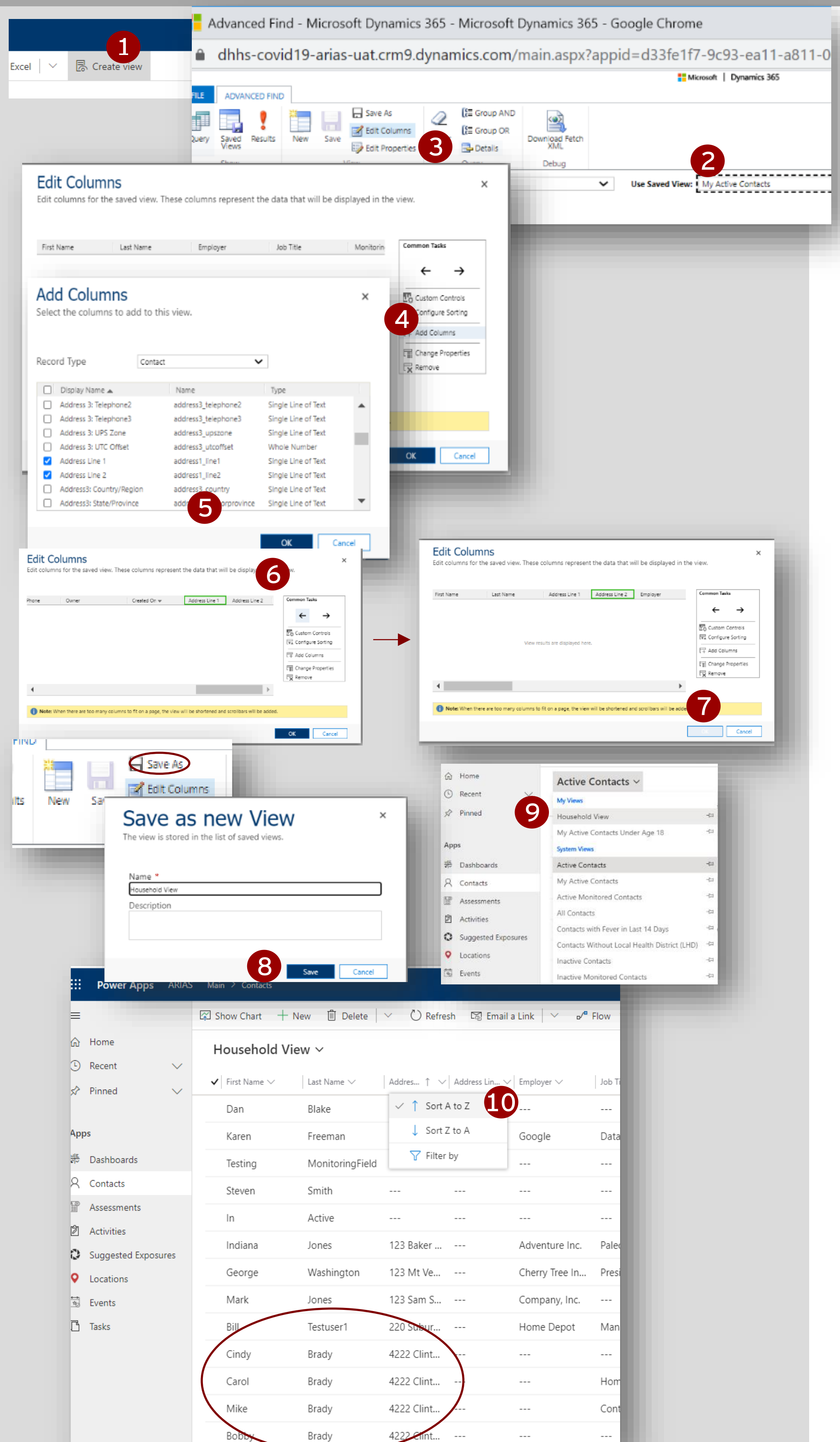
6 Moving columns

7 "OK"

8 Saving your view

9 "Household View"

10 Sort A → Z



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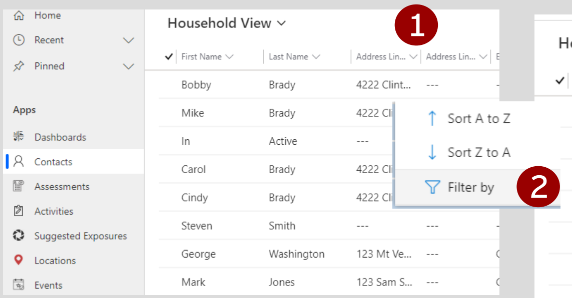
Once you have entered contacts, you are able to assign them using the Contacts Tab:

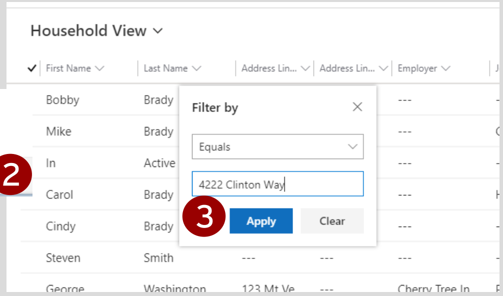
Assigning Households & Other Contacts

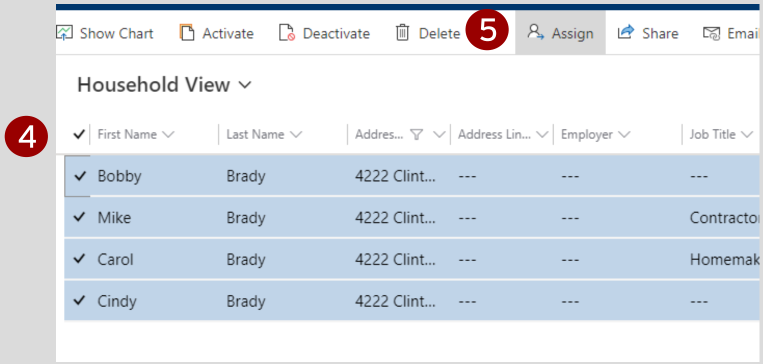
After you have created a view that allows you to sort and filter by address, you are able to view an entire household at the same time. **Always assign an entire household to the same Contact Tracer – this is critical to effective monitoring.**

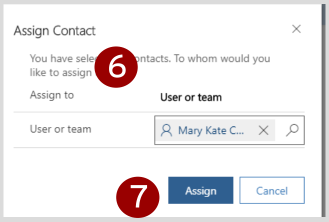
If you are not assigning a household and only need to assign unrelated contacts, skip to Step 4.

1. In your new "Household View," review "Address Line 1" and "Address Line 2." Contacts who have matching values are in the same household.
2. See the entire household in question by clicking the arrow in "Address Line 1" (and "Address Line 2," if needed) on the household's address and selecting "Filter by."
3. Type the relevant section of the address and click "Apply." You should now see the entire household.
4. Select all individuals with the checkmark functionality.
5. Click the "Assign" box.
6. Single click "Me" to produce the screen for selecting a "User or Team" by typing their name.
7. Click "Assign." *If needed, remain on this filtered view to begin documenting your household and proceed to the next page.*

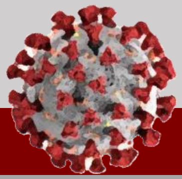








1. **Address Line 1, 2**
2. **"Filter by"**
3. **"Apply"**
4. **Checkmarks**
5. **"Assign" box**
6. **"Me"/"User or Team"**
7. **"Assign"**



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If you have input a household, documenting it will aid Contact Tracers' monitoring and outreach efforts:

Documenting Households

Currently, the system does not support functionality to link contacts, so it is important that we document households in Timeline/Activities to prevent repeat outreach.

If you are not inputting a household, you can skip this process.

1. While filtered on your household in "Household View," click the first individual's name.
2. Once you are navigated to their profile, find the Timeline/Activities section. Click "**+**" **-->** "Note" to add a note documenting your household.
3. Title your note with "Household" and an indicative title. In this case, we use "Household: 4222 Clinton Way," as this is the street address.
4. In the description, include the household address and the names of its members. You may also include any other information that is helpful to you, such as to whom you will speak if you are conducting phone outreach.
5. Copy the description of this note, as you will be able to re-use it for each family member.
6. Click "Add Note" to save.
7. **Without leaving the contact's profile, press the "Back" button in the top corner of your browser.**
8. This will return you to the same filtered view, and you can repeat this note-adding process for each member of your household.

1	**Contact Profile**
2	**"Note"**
3	**Title**
4	**Description**
5	**Copy Description**
6	**"Add Note"**
7	**Back Button**
8	**Repeat**